

Confirmation Number:

Program Title: ***Local Government Initiatives***

Proposed by:

Southern California Edison

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List of all other public goods charge programs proposed:

1. Statewide Residential Appliance Recycling
2. Statewide Single Family Energy Efficiency Rebates
3. Statewide Multifamily Energy Efficiency Rebates
4. Statewide Home Energy Efficiency Surveys
5. Statewide CA Energy Star New Homes – Single Family, Multifamily programs
6. Statewide Standard Performance Contract
7. Statewide Express Efficiency
8. Statewide Nonresidential Energy Audits
9. Statewide Building Operator Certification
10. Statewide Emerging Technologies
11. Statewide Savings By Design
12. Statewide Education and Training
13. Statewide Codes and Standards Advocacy
14. Local Small Nonresidential Hard to Reach
15. Local Pump Test and Hydraulic Services
16. **Local Government Initiatives**
17. Local Community Partnership – 12 Cities
18. Local Community Partnership - Ventura County
19. Local Community Partnership - South Bay Cities Council of Governments
20. Local Los Angeles County program
21. Local UC/CSU program
22. Local Community Partnership – Bakersfield/Kern County
23. Local City of Pomona program

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Local Government Initiative

I. Program Overview

A. ~~A.~~ Program Concept

Through a partnering with local governments and cities, (collectively referred to as Jurisdictions), Southern California Edison's (SCE) Local Government Initiative (LGI) will facilitate the offering of statewide, local energy efficiency information and education, hardware rebates, and increased energy efficiency opportunities using a variety of intervention strategies. SCE will also coordinate with third party program implementers to optimize this intervention opportunity. The primary target audiences for this initiative are the various departments/offices within the local governments such as: Building Departments, Community Development/Outreach, Economic Development, and Housing Authorities. The secondary audience and the ultimate benefactors of this initiative include: SCE's small to medium-business owners, lower-to-moderate income residential customers, single and multifamily existing residential customers, and residential and small commercial builders

The flagship of this initiative is the Community Energy Efficiency Program (CEEP) -- a program created by the California Building Industry Association's Building Industry Institute (BII) in 1998. Since 2000, BII and SCE together have been working with California local governments to create and promulgate a voluntary energy efficiency program that improves the quality and energy efficiency of new homes, and is mutually beneficial to both the local government and participating builders. The voluntary component of this program fosters more of a "team" working relationship between the building department and the builders. In many cases this relationship is tenuous and adversarial resulting from code requirements/enforcement. Influencing builders takes a long-term commitment of promotion, technical support, and reward. CEEP's innovative approach to working with the builders through the Jurisdictions has proven to be hugely successful as well presenting new opportunities for increased energy efficiency within residential new construction.

Through CEEP, SCE has been able to aid in the building of infrastructure to support Title 24 with its numerous changes (2001 and 2005 Building Energy Efficiency Standards, Part 6) via the ongoing comprehensive training and information updates provided to the building officials and their respective departments. Although this program is considered an information program, there are significant anecdotal energy savings resulting from rigorous installation protocols required for participation in CEEP. These installation protocols, which were established by BII, will have a prominent role in the

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pending 2005 Title 24 Standards, as this feature will be recognized as an “upgradeable” performance measure in the new Standards.

Continuing with the LGI cornerstone -- CEEP, SCE will also further develop its approach in working with the Jurisdictions. The roles of the Jurisdictions change dramatically from city to city, for many different reasons including politics, demography, economic fortitude, etc. Not every program SCE offers fits the needs of all the Jurisdictions, therefore SCE will spend a great deal of effort identifying the energy efficiency goals of our cities. Working side-by-side with the cities, to customize offerings (either through bundled offerings, ~~or~~ modifying individual programs, or attending community outreach events) will fill a specific need within a Jurisdiction, and/or better reach an identified Hard-to-Reach (HTR) component within the city.- Collaboration with Jurisdictions is an effective adjunct to the utility-to-customer approach used in many of SCE’s programs, leveraging the influence of the Jurisdictions who share similar energy efficiency goals.

B. Program Rationale

Drawing experience from our existing LGI which began in 2002 through the work done with the many local governments participating in the program, SCE recognizes that Jurisdictions are viewed as a knowledgeable authority by their public. The LGI will effectively optimize that viewpoint by using the Jurisdictions’ influence to leverage SCE’s diverse portfolio of statewide and local energy efficiency programs and services, as well as facilitating coordination between third party energy efficiency implementers and the Jurisdictions when and where applicable. Equity for SCE’s diverse customer base is a primary focus in this program and by working together through this partnership, SCE and the Jurisdictions will work toward the common goal of achieving long-term energy savings, lower utility bills, and a more comfortable home and work environment for our shared HTR customers.

SCE works with the Jurisdictions on marketing and outreach material. To show that this is truly a collaborative effort between SCE and the participating cities, SCE provides information materials (kiosk, fact sheets, and program applications) that include the cities crest or logo. The following Jurisdictions listed below, selected for their growth potential and/or HTR designation, are currently participating in SCE’s LGI:

<u>Apple Valley</u>	<u>Indian Wells</u>	<u>Redlands</u>
<u>Arcadia</u>	<u>Kern County</u>	<u>Riverside County</u>
<u>Banning</u>	<u>Lake Elsinore</u>	<u>San Bernardino</u>
<u>Beaumont</u>	<u>Lancaster</u>	<u>San Bernardino County</u>
<u>Brea</u>	<u>Loma Linda</u>	<u>San Jacinto</u>
<u>Camarillo</u>	<u>Los Angeles County</u>	<u>Santa Clarita</u>
<u>Cathedral City</u>	<u>Mission Viejo</u>	<u>Simi Valley</u>

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<u>Chino</u>	<u>Monterey Park</u>	<u>Temecula</u>
<u>Chino Hills</u>	<u>Moorpark</u>	<u>Thousand Oaks</u>
<u>Corona</u>	<u>Moreno Valley</u>	<u>Tulare</u>
<u>Costa Mesa</u>	<u>Murrieta</u>	<u>Tustin</u>
<u>Delano</u>	<u>Norco</u>	<u>Upland</u>
<u>Desert Hot Springs</u>	<u>Ontario</u>	<u>Ventura</u>
<u>Diamond Bar</u>	<u>Orange</u>	<u>Victorville</u>
<u>Fontana</u>	<u>Orange County</u>	<u>Visalia</u>
<u>Fullerton</u>	<u>Palm Desert</u>	<u>Westminster</u>
<u>Garden Grove</u>	<u>Palm Springs</u>	<u>Yorba Linda</u>
<u>Hanford</u>	<u>Palmdale</u>	
<u>Hemet</u>	<u>Placentia</u>	
<u>Hesperia</u>	<u>Porterville</u>	
<u>Highland</u>	<u>Rancho Cucamonga</u>	
<u>Huntington Beach</u>	<u>Rancho Mirage</u>	

Building upon SCE's current LGI program, this initiative will assist the Jurisdictions in further establishing themselves as an energy efficiency resource through expanded program offerings, primarily focused on residential and nonresidential new construction, hardware rebates for small businesses, direct install opportunities for single and multifamily existing housing, energy efficiency information and education through (residential and nonresidential surveys, as well as outreach information regarding the CARE and Large Household Rate Discount program (available in March 2004 to limited-income customers with three or more household occupants), as well as providing access and information related to applicable third party energy efficiency programs offered in SCE's service territory).

The LGI will enable Jurisdictions to take the lead on directing their public to more accessible energy efficiency solutions, while adding value to SCE's local and statewide programs through enhanced delivery channels.

C. Program Objective

Through the diverse portfolio of energy efficiency offerings, the LGI will provide numerous short and long-term benefits to participating Jurisdictions. On the short term, Using the concept of "neighborhood sweeps," or active participation in community events, the Jurisdictions constituents could conceivably enjoy immediate energy and utility cost savings.

Direct contact with SCE's current LGI participants indicates the Jurisdictions would champion new initiatives and would gladly work in partnership with SCE on selected projects of relevance to their jurisdictions. These Jurisdictions value SCE's technical resources and expertise and are of

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significant value to jurisdictions striving to advance energy- efficient practices locally. On the longer term, the LGI will offer a variety of residential and nonresidential new construction intervention strategies which may include: Building Commissioning, training of building departments on energy efficiency standards (Title 24), as well as incentive programs for residential and small commercial builders. It is SCE's goal to work with the Jurisdictions on developing a longer term energy efficiency strategy that positively affects all customer segments, and aligns with the overall goals of the cities they serve.

II. Program Process

A. Program Implementation

The LGI will continue to build on the existing relationships SCE has established through the current program, as well as key relationships SCE has developed through other energy efficiency interface venues.

Currently, the role of the Jurisdictions can be described as the following:

- To receive extensive training in order to decrease staff time required to review residential new construction plan submittals (because they are inherently more complete and of a higher quality). In essence, this training helps the building departments do their jobs better.
- Offer a voluntary program for builders with tangible incentives for building beyond the energy code and applying new, high-quality building practices.
- Work with SCE on developing local energy efficiency strategies customized for the Jurisdictions unique needs.
- Offer the various programs to their constituents and further promote energy efficiency.

SCE will work with selected Jurisdictions and/or Jurisdiction's organizations to develop a program plan that recognizes their individual needs. Through the LGI, SCE will work with Jurisdictions to either customize a bundled

program offering specific to the needs of the Jurisdiction, or work with them to establish an enhanced delivery mechanism for SCE's existing comprehensive portfolio of small business, residential (both multifamily and single family), new construction programs, and applicable low-to-moderate income. The LGI provides ample opportunities for all customer segments to reduce energy use and lower utilities bills.

Depending on the needs of the Jurisdictions, all or a combination of the following programs can provide effective energy efficiency results:

Community Energy Efficiency Program (CEEP)

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The goal of this program is to continue working with existing Jurisdictions to encourage residential building practices that conserve energy and resources and motivate builders to build homes that exceed Title 24 energy efficiency requirements by 15%. By building homes that exceed Title 24, builders are eligible to participate in the California Energy Star New Homes Program, a statewide residential new construction incentive program. Jurisdictions may choose to recognize builders in some fashion who are building energy-efficient homes in their Jurisdictions by way of expediting plan check/field inspections, discounted permit fees, or special recognition. Through the CEEP program, SCE will work with the local building departments on updates and education on the pending 2005 Title 24 Building Standards.

Cities adopting CEEP as a voluntary energy efficiency initiative targeted at residential builders will require the following from participants:

- Before construction, each home plan must have a preliminary California Home Energy Efficiency Rating System (CHEERS) rating of 87 or greater
- Each home must have an HVAC system designed to Air Conditioning Contractors of America (ACCA Manuals J, D, and S) requirements, and the design stamped by an engineer, registered in the State of California
- The home must meet the California Energy Commission's "Tight Duct" criteria (less than 6 percent leakage)
- The home must exceed Title 24 by a minimum of 15 percent, indicating EPA Energy Star® Homes program compliance
- The builder must use detailed contractor scopes of work, and notify installing subcontractors (insulation, window, and HVAC) that scopes of work will be used as the basis for quality inspections
- Before final inspection, participating homes must have a final HERS rating of 87 or greater, documenting that they passed HERS inspection and diagnostics, and verified the T-24 and enhanced features

Residential

Online Home Energy Surveys

On-Line surveys provide customers easy access via the SCE's Websites. The interactive feature allows customers to obtain immediate results by answering specific questions regarding their home energy use on line. This On-Line home energy analysis only takes a few minutes to complete and provides an analysis of energy use in their homes as well as energy-saving recommendations. The On-Line Home Energy Efficiency Survey (HEES -- a component of the statewide residential survey program) is available in both the short and extensive version. Promotions may be offered to increase customer participation.

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In-Home Survey

Participating customers in SCE's service areas may participate in this component by contacting their local utility. This approach provides customers, particularly HTR customers who do not respond to Internet and Mail-In survey options, with a more personalized, face-to-face energy survey option. A specially trained energy surveyor inspects the home and can provide the customer with immediate answers to basic questions as well as specific recommendations on how customers can save energy and manage costs based on their homes and lifestyles. The customers may also choose the Phone survey option, in SCE service areas, that allows customer to obtain immediate results from a trained surveyor who walks the customer through the survey over the phone. Promotions may be offered to increase customer participation.

Mail-In Survey

Participating customers receive a survey either through direct mail, contacting their local utility, or by printing a hardcopy of the On-Line survey. Customer's mail completed surveys to a statewide Mail-In survey contractor for processing. Once received, surveys are analyzed against customer billing data

to produce an energy analysis report containing customer-specific results. Reports include 1) an end-use breakdown of electricity, 2) monthly usage trend graph, and 3) a set of recommendations, with corresponding estimated savings that are appropriate for each customer based on their survey responses. Additionally, reports include information on energy efficiency products and services, rebate programs, and other energy-related information to encourage adoption of energy efficiency measures identified through the energy survey

Multifamily Energy Efficiency Rebate Program

This program targets property owners and managers of existing multifamily residential dwellings. Through the LGI SCE will work with the Jurisdictions to train staff on evaluating the need for higher efficiency lighting (both interior and exterior common area) and programmable thermostats, and the subsequent replacement and installation. SCE has experienced past success with the statewide version of this program. In 2002, SCE successfully achieved high installation levels of interior compact fluorescent screw-in light bulbs (CFLs) which impacted over 2000 residents in apartment dwellings. In 2003 SCE anticipates the installation of 7,000 interior screw-in CFLs.

Through the demonstrated success of the torchiere replacement program offered in the 2002 Multifamily Energy Efficiency Program, which provided over 2000 fluorescent torchieres (with the same amount expected to be

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replaced in 2003), to residents in apartment dwellings, this component has an ideal fit within the LGI.

The Multifamily Energy Efficiency Rebate Program provides incentives for several other measures including: windows, programmable thermostats, exit signs, and other lighting, cooling, and mechanical products.

Refrigerator Recycling

The Statewide Residential Appliance Recycling program (RARP) is designed to produce cost effective coincident peak demand reduction and long-term annual energy savings by allowing eligible customers (single family and multifamily owners/landlords and tenants) to dispose of their operable, inefficient primary and secondary refrigerators and freezers in an environmentally safe manner. The significant cost effective long-term peak demand reduction and annual energy savings are due to the accelerated retirement and removal from potential resale markets of the older and least efficient refrigerators. The program will also overcome a key market barrier by informing the consumer about the energy efficiency benefits of recycling older inefficient refrigerators and freezers. Considerable non-energy environmental benefits will also be generated due to an increase in the proper reclamation and recycling of potentially hazardous refrigerants and other materials.

Nonresidential

Small Nonresidential Hard-to-Reach

Through the LGI, ~~HTR hard-to-reach~~ customers (lower to moderate-income residential and small to medium-business) will receive the benefit of no-cost/low cost energy efficiency upgrades. This direct install component achieves immediate energy savings and electric demand reduction through the delivery of energy efficiency programs for lower to moderate-income residential multi-family, residential mobile home, and nonresidential customers. Program offering includes indoor/outdoor lighting, programmable thermostats, a/c tune-ups, duct sealing, window a/c, refrigeration tune-up, lighting controls, among other things. SCE is currently offering a DI program to the Small Nonresidential HTR which provides no-cost energy-efficient lighting retrofits to very small business customers in HTR rural areas within SCE's service territory. This program has proven to be extremely successful and is expected to be fully subscribed by October 2003, achieving in excess of 5,216 MWh when it's fully committed.

CheckPoint

CheckPoint is a local, modified version of the larger statewide Savings By Design program that encourages customers to install energy-efficient equipment that exceeds Title 24 requirements in small nonresidential new construction. Equipment qualifying for rebates may include: occupancy

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sensor controls, LED exit signs, high efficiency package air conditioning units, and skylighting controls.

Express Efficiency

This statewide small to medium-size business program targets commercial, industrial and agricultural customers with a kW demand of less than 500 kW. Customers who qualify must replace or upgrade approved energy-efficient equipment such as lighting, air conditioning, refrigeration, food service, and other equipment.

Energy Efficiency Surveys, Audits, Information, Education, and Outreach

Energy efficiency education is intended to provide customers with information regarding general (non-customer specific) conservation and energy efficiency opportunities. For residential customers this is accomplished through newsletters or publications promoting energy efficiency and the LGI to the cities' residential constituents through direct mailers, distribution on energy efficiency fairs (turn-in events) and community events.

Nonresidential customers will receive similar information regarding general conservation and energy efficiency opportunities. In addition, on-site energy surveys, energy efficiency seminars and training, building operator training and certification (for city facilities energy managers/engineers), and promotion of the utilities prescriptive rebates and measured energy savings incentive.

CARE and Large Household Rate Discount

Information for the low income CARE program will be made available to the Jurisdictions to offer to their qualified constituents. Additionally, a new rate discount program for large households will be available in March of this year. This new element will provide a rate discount (eliminating the Tier 3 rate) to income-qualified (175% to 250% of poverty level) customer with three or more occupants.

B. Marketing Plan

The Program marketing campaign for 2004-05 will focus on both outreach to the Jurisdictions, and communication with the residential and nonresidential

customers. Jurisdictions will be addressed through direct mail, fact sheets, and face-to-face contact. Customer education and outreach regarding available programs and services will be customized to meet the needs of the specific Jurisdiction. SCE will assist local governments with education and outreach for the LGI via technical assistance, "plan-check counter" expertise (new construction) literature, web links, magazine and newspaper articles, and training.

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Although a fact sheet describing the LGI will be created, program-specific literature (California Energy Star New Homes program, Savings By Design, Small Business Express Efficiency) that includes the necessary details for participation will be provided to the appropriate segment customers (i.e., small business, residential and nonresidential new construction).

Additionally, SCE will provide on-site marketing support where applicable.

On site outreach, information materials, and support will be available at the Jurisdictions' request. Some of the program literature created just for use within the LGI can be customized to include the Jurisdictions', cities', or counties' logos. If applicable, SCE will also create Jurisdiction-specific information kiosks that can be placed within the Jurisdictions' facilities in high-traffic or public areas.

When and where applicable, SCE representatives will also be available to address or support the City Council of those Jurisdictions striving to adopt energy efficiency practices through draft resolutions or other means.

SCE will also have a LGI or Local Government Initiative webpage located within www.sce.com. All of SCE's programs will be listed with brief descriptions on the page, with links to the specific program's page (if applicable).

Marketing Material	Quantity	Method of Distribution	Projected Cost/Marketing Effort
Partnership Fact Sheet	500	Direct contact. Mail	\$750
CEEP Fact Sheet	1000	Direct contact. Mail	\$400
CheckPoint Applications	1000	Direct contact/Mail	\$400
Customer Outreach Flyers	50,000	Direct Mail	\$30,000
Information Kiosks	TBD	Local government offices, Jurisdiction Offices	\$1,500 ea.

C. Customer Enrollment

Both existing jurisdictions as well as new jurisdictions wanting to participate in 2004 will need to confirm their participation by filling out a current Jurisdiction Partnership/Local Government Initiative Enrollment Form. Prior

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to the Jurisdiction filling out the enrollment form some of the following outreach and information activities may be implemented for new Jurisdictions:

- Contacting the targeted local jurisdiction's decision-makers about the LGI
- Meet with local government representatives to assess the local needs and create new implementation strategies and approaches for the LGI (where applicable in each program area) then individually tailor the LGI as appropriate to meet each local government's needs, and the needs of their respective constituents
- Brief local government officials as required by Jurisdiction official(s) (e.g., City Councils, Board of Supervisors, City Managers, City Planners, Office of Economic Development, etc.)

The following activities will be implemented prior to existing Jurisdictions re-enrolling in the LGI:

- Re-assess Jurisdictions' needs and goals
- Create new support programs, training, etc.

D. Materials

This program's focus is on delivering a diverse bundling of effective energy efficiency programs from SCE's broad portfolio of energy efficiency programs, as well as providing access and information to applicable third party energy efficiency programs. Specific materials or equipment will not be purchased with this program's supporting budget; however, the Direct Install component tied to the Multifamily Energy Efficiency Rebate Program and the Small Nonresidential Hard-to-Reach does have a Materials component.

E. Payment of Incentives

The rebates for CEEP (CESNHP), CheckPoint, Express Efficiency, Multifamily Energy Efficiency Rebates, and Small Nonresidential Hard-to-Reach will come from those programs' respective incentive budgets. Energy savings will not be counted in this LGI, but rather in each of those specific programs. The purpose of this program is to help local jurisdictions establish an energy efficiency plan which includes providing them with a "bundling" of existing utility programs targeted at the new construction, small commercial HTR retrofit, and single and multifamily existing residential customers of both SCE and the local jurisdictions.

F. Staff and Subcontractor Responsibilities

SCE will continue its partnership with the Building Industry Institute (BII) to deliver the Community Energy Efficiency Program (CEEP) and related new construction activities. BII is the nonprofit, educational and research arm of the California Building Industry Association (CBIA) and creator of (CEEP).

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CEEP is a voluntary new construction program designed to result in significant long-term energy savings to local governments that choose to implement the program.

The promotion of outreach activities will be formulated jointly with the utility to ensure the Jurisdiction message is complemented by the administering utility's service. SCE will be responsible for managing all aspects of the program to ensure that the Jurisdictions needs are met, while at the same time ensuring that all program and regulatory requirements are being implemented correctly at the local level. SCE will be responsible for reporting program progress, budget activity, and energy savings activity resulting from the LGI..

G. Work Plan Timeline for Program Implementation

Work Plan and Timeline

Program Implementation Activity	Date
2004 Enrollment Forms	2/26 2/2004
LGI Fact Sheet	3/15/04
Information Kiosks	Ongoing
SCE Jurisdiction Partnership Webpage	12/31/05
Analyze Local Needs and Customize EE Program	1/2/04 - Ongoing

III. Customer Description

A. Customer Description

SCE's small to medium-business owners, lower-to-moderate income residential customers, single and multifamily existing residential consumers, and residential and small commercial builders will ultimately be the targeted customer segments within the LGI. However, the primary customer will be the Jurisdictions (many with a significant Hard-to-Reach element) participating in the LGI.

B. Customer Eligibility

All local jurisdictions within SCE's service territory are eligible to participate in the SCE-Jurisdictions; however, in some cases, priority will be placed on specific jurisdictions with hard-to-reach elements such as lower income or underserved "outlying" locations

C. Customer Complaint Resolution

SCE's Local Government Initiative project manager will handle specific customer questions or complaints on a case-by-case basis. The issues will be reviewed and researched and an appropriate resolution will be initiated. If resolution cannot be reached, the issue will be elevated to the next appropriate level of management until issue is fully resolved.

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D. Geographic Area

Jurisdictions within SCE's service territory.

IV. Measure and Activity Description

A. Energy Savings Assumptions

Based upon the CPUC's approved Energy Efficiency Policy Manual, this information program implementation plan is not expected to provide energy savings targets

B. Deviation in Standard Cost Effectiveness Values

Section IV.B. is not applicable.

C. Rebate Amounts

The rebates for CEEP (CESNHP), CheckPoint, Express Efficiency, Multifamily Energy Efficiency Rebates, and Small Nonresidential Hard-to-Reach will come from those programs' respective incentive budgets. Energy savings will be counted in each of those specific programs. The purpose of this program is to help local jurisdictions establish an energy efficiency plan which includes providing them with a "bundling" of existing utility programs targeted at the new construction, small commercial HTR retrofit, and multifamily retrofit customers of both SCE and the local jurisdictions.

D. Activities Description

SCE will conduct several activities to promote the LGI program, which in a large part, includes the facilitation of some of SCE's existing programs. Although the energy savings associated with the program portfolio will be attributed to the respective programs, part of the activity undertaken in this program is intended to promote these programs to increase the energy savings opportunities. Some of the activities are described in the table below.

Activity

- Completion of the 2004 enrollment forms will indicate a desire from the participating jurisdictions to continue and expand their energy efficiency commitment
- Building Department Training/Information Outreach will provide the building departments with pre-emptive information regarding the pending Title 24 code revision
- Coordinating activities that promote the Residential and Multifamily Retrofit Programs will increase the reach of these programs by working with the Jurisdictions as an effective delivery channel. The outreach activity will vary based on the needs of the cities but could include information kiosks placed within jurisdiction or city facility, direct mail, local city activities, turn-in events, etc.
- Coordinating activities that promote the Nonresidential Programs will

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increase the reach of these programs by working with the Jurisdictions as an effective delivery channel. The outreach activity will vary based on the needs of the cities but could include information kiosk place within jurisdiction or city facility, direct mail, neighborhood sweeps, local city activities, turn-in events, etc.

V. Goals

The primary goal of this program will be to secure continued participation, as well as expansion, of the existing jurisdictions. One matrix for measuring participation will be through the execution of the 2004 LGI Enrollment Form. Additionally, SCE will seek to expand participation in the program to new Jurisdictions with a large HTR element.

Activity	Target
Completed 2004 Enrollment Forms	32
Expand to New Jurisdictions Identified as HTR	10
Conduct Building Department Training or Information Updates on 2005 Title Code Revision	12
Coordinate Activities Promoting Residential and MF Retrofit Programs	10
Coordinate Activities Promoting Nonresidential Programs	10

VI. Program Evaluation, Measurement and Verification (EM&V)

A. General Approach to Evaluating Program Success

This EM&V plan is based on the Commission's objectives as outlined in the Energy Efficiency Policy Manual (EE Policy Manual) and adheres to the guidelines in the International Performance Measurement and Verification Protocol (IPMVP).

This EM&V plan will meet the objectives of the Commission as outlined in the Energy Efficiency Policy Manual by evaluating the success of the program activities in target jurisdiction through multiple EM&V activities. The EM&V approach will be designed to assess the collaboration process with local jurisdictions that share similar energy efficiency goals for their jurisdictions. Key areas of this assessment will include assessing achieved level of energy savings for the jurisdiction due to program's direct install efforts and other energy efficiency activities. Additionally, the program is going to be evaluated for effectiveness of its marketing and interaction with participating jurisdictions, and the coordination mechanism in place for outreach to shared customer groups for effective promotion and implementation of energy efficiency programs.

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B. Approach to Measurement and Verification of Energy and Peak Demand Savings

Assessment of achieved long term energy savings will be based on measured and verified energy and demand savings that will conform to Option A in the International Performance Measurement and Verification Protocol (IPMVP), in accordance with the Energy Efficiency Policy Manual. The verification of installed measures in the target jurisdictions will be coordinated with relevant statewide EM&V studies. Such an approach will also provide the program's accomplishments in the quantifiable form of verifying energy efficiency program participation rate by each participating jurisdiction as verified by an independent EM&V consultant.

C. Approach to Evaluation Program Success

The remaining aspects of overall program evaluation and the remaining EM&V objectives of the Commission are covered in this section. The remaining activities are as follows:

- *Market Assessment and Customer Behavior Analyses:* These activities will examine the response to the Jurisdiction LGI by the local jurisdiction and its citizen groups, especially HTR groups within these Jurisdictions. This will be done by gathering feedback data from officials of target jurisdictions, supplemented with information from consumer data that is gathered as part of the general consumer surveys by EM&V studies for residential and nonresidential programs. The information on market response and satisfaction levels will assist in identifying areas of opportunity for furthering this partnership effort.
- *Process Evaluations:* Since the program's approach is to use the local jurisdictions connection to their citizens as a delivery channel for SCE's broad portfolio of energy efficiency programs, the process evaluation of this program will entail identifying successful partnership stories and areas of improvement opportunities for effective marketing, and interaction with participating Jurisdictions. This element of evaluation will put in place a timely feedback process that will provide recommendations to improve program performance. To do this, a process will be put in place as soon as the program is implemented that will monitor the energy efficiency participation activities in the participating Jurisdictions. Energy Efficiency program activities in the participating jurisdictions will be monitored to provide timely information on where increased alternative marketing approaches, and/or more customized program approaches are needed to benefit these Jurisdictions.

D. Potential EM&V Contractors

The contractors listed below can objectively and effectively evaluate program success. As a group, their work includes impact evaluation, measurement and verification, process evaluation, market assessments, and verification of program accomplishments. These firms have a track record of completing

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high quality, objective studies of energy efficiency programs either for the California investor-owned utilities or for other entities whose studies we have been able to review. This list does not include all of the qualified evaluators who could objectively evaluate program success.

- ADM Associates
- Aspen Systems Corp.
- Energy Market Innovations
- Equipoise Consulting
- Freeman Sullivan & Co.
- Frontier Associates
- GDS Associates
- Global Energy Partners
- Heschong-Mahone Group
- ICF Consulting
- Itron (RER)
- KEMA XENERGY
- KVDR Consulting
- Megdal & Associates
- Nexant
- Opinion Dynamics
- Quantec LLC
- Quantum Consulting
- Ridge and Associates
- PA Consulting Group
- Research Into Action
- RLW Analytics
- Robert Mowris & Associates
- SBW Engineering
- Science Applications International Corp. (SAIC)
- Summit Blue Consulting
- TecMARKET Works
- Vanward Consulting
- Wirtshafter Associates

VII. Qualifications

A. Primary Implementer

As a whole, SCE is uniquely qualified to provide programs and services for the Jurisdictions within our service territory. At the core of this LGI is SCE's extensive experience at delivering a broad portfolio of energy efficiency statewide and local programs that form a solid and reliable foundation of energy savings opportunities that our Jurisdictions and shared customers can

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rely upon. Over the years, SCE has developed energy efficiency experience, expertise and a support infrastructure that is second to none. Moreover, our long-term commitment to and credibility with our customers is critical to widespread acceptance of energy efficiency information and recommendations for action. Continuing this tradition of excellence in energy efficiency, SCE's 2004 - 2005 portfolio of statewide, local, and Jurisdiction LGIs incorporates innovation into our proven track record of program success in all program areas

SCE is responsible for managing and implementing the LGI program within SCE's service territory. As a whole, SCE is uniquely qualified to provide the core of statewide and local programs that form a solid and reliable foundation of energy savings opportunities that our customers and the State can rely upon. Over the years, SCE has developed energy efficiency experience, expertise and a support infrastructure that is second to none. Moreover, our long-term commitment to and credibility with our customers are critical to widespread acceptance of energy efficiency information and recommendations for action. Finally, SCE provides ironclad accountability to our regulators and the customers we've served for over a century that is invaluable to ensuring that public money is appropriately spent.

SCE's experience in energy efficiency is a century long. We began assisting customers in the wise use of energy in the early 1900s, when we first began helping our agricultural customers to test the efficiency of their electric pumps. Beginning in the 1980's, the energy efficiency programs designed by SCE have been nationally recognized and have helped California assume a leadership role in energy efficiency. Continuing this tradition of excellence in energy efficiency, SCE's 2002 portfolio of statewide and local programs incorporates innovation into our proven track record of program success in all program areas:

Residential - SCE's participation in the delivery of residential programs began in the early 1980s, when we began offering comprehensive audits that linked information collected in customer homes by certified energy service representatives to actual billing histories. Through this unique service, customers received immediate audit results that directed them to rebate programs available for recommended energy-saving measure and device retrofits. Conservation information materials were also made available to customers for the first time. Today, SCE continues this two-decade tradition through a similar close combination of residential information, energy survey, and rebate services, but updated to reflect today's technological advances. With a staff comprised of energy efficiency experts with professional experience in other business fields, SCE has designed modern programs that offer a variety of energy efficiency tools on-line, including information, energy use calculator/estimators and an energy survey that provides

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instantaneous recommendations based on each participating customer's energy use. Strong business relationships between SCE and major retailers now enable SCE to pay incentives directly to a customer through several delivery mechanisms: as the result of an application process, at the cash register, or as part of price buy downs at the manufacturer level. Staff with marketing knowledge develops strategies that call out the best and most efficient method of reaching the right customer group with the program mix that best matches their needs.

Nonresidential - Southern California Edison has provided nonresidential customers with energy efficiency programs under the direction of the Commission since 1976. Early programs provided information to customers on how to use energy more efficiently through improved operations and maintenance practices. Since that time, SCE's programs have evolved, expanded, and diversified into a comprehensive mixture of information and incentive programs. SCE is a national leader in the development and operation of performance-based energy efficiency incentive programs including DSM Bidding and Standard Performance Contract Programs. Our programs have grown and contracted, shifted focus and emphasis, or completely changed philosophy as needed to incorporate the changing goals of the Commission, the needs of the marketplace and input of the many stakeholders in the energy efficiency industry. Most important, SCE's customers have grown to trust the utility as the single, unbiased source of energy efficiency information, services and programs. No matter what else was happening to affect customer opinion of the utility industry, our business customers continued to look to SCE for assistance in managing their energy use and costs.

New Construction – For over 20 years, Southern California Edison has designed and operated programs aimed at improving the energy efficiency of new buildings, both residential and nonresidential. Whether through financial incentives, technology showcases, builder and consumer education, or assistance to design professionals, SCE programs have effected significant, permanent improvements in the energy efficiency of new buildings in its service territory. Since the early 1990s, builders participating in SCE's residential programs have built over 50,000 homes that exceeded state building standards. For nonresidential new construction, SCE has refined and enhanced a wide array of educational and design assistance tools, including free state-of-the-art online technical assistance, for the commercial building industry. We have a well-respected group of design professionals on our staff including architects and engineers, and we have established alliances throughout the design and construction industry with organizations such as AIA, ASHRAE, IES, AEE, IEEE, CEE.

The program design and implementation team who plan, administer, deliver and support our programs provides unparalleled expertise in energy efficiency

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programs. Our program managers have an average of ten years of experience in energy efficiency and related customer service activities and are supported by a veteran staff of technical experts in all facets of energy efficiency. Our design and technical support staff have over 300 years of combined experience, over two-thirds are licensed by state or federal organizations, and over half have advanced degrees. Our program design and evaluation staffs also have extensive first-hand knowledge of the customer demographics unique to SCE's service territory. After all, for over 100 years we've lived and worked with the customers we serve.

Finally, as a utility who serves all of the energy needs of all of our customers, SCE also has an existing infrastructure of support functions (such as accounting, regulatory and legal departments), systems (such as our program tracking and reporting systems) and facilities (such as our energy centers) that we use to facilitate the successful implementation of our programs. Further, our long-term relationship with the Commission and the customers we serve further ensures that our customers will be well served and protected. Using the experience and resources described above, SCE stands ready to satisfy our customers' energy efficiency needs and meet the Commission's policy objectives.

B. Subcontractors

SCE will partner with the Building Industry Institute (BII) to implement CEEP, the residential new construction component of the LGI. Since 1999, BII has successfully obtained participation from 40 jurisdictions, primarily in SCE's territory, and elsewhere throughout the state. As the non-profit, research and educational arm of the California Building Industry Association (CBIA), BII has received national recognition from the Department of Energy and others for its on-going Builder Energy Code Training (BECT) program. This program trains builders, architects, and local building officials on the "how to's" and benefits of energy-efficient, cost-effective construction and quality control. Many local governments implementing the CEEP also take advantage of the BECT.

C. Resumes or Description of Expertise

John F. Nall, Manager, Residential Programs

Mr. Nall is the Manager of Residential Energy Efficiency and Low Income Programs for SCE. During his 20 year career at SCE, John created some of the first energy efficiency programs targeted to low-income customers while a program manager and later supervised a low-income operation that consistently met or exceeded goals each year. This record of performance continued when he assumed responsibility for the entire residential portfolio, including Low Income Energy Efficiency and administration of the CARE rate. John graduated from Ball State University with a bachelor's degree in education and received an MFA degree from Indiana University. Prior to

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working with SCE, he held positions with the California State Department of Community Services (formerly, the State Office of Economic Opportunity) and Foothill Area Community Services of Pasadena.

Michelle Thomas, Residential New Construction Project Manager

Michelle Thomas has over 13 years of experience in energy efficiency within the residential new construction market segment. With a career that began as an account executive working directly with residential builders and related industry professionals, on Title 24 compliance issues and participation in SCE's residential new construction energy efficiency programs. Michelle's role within the program grew to include direct responsibilities in the program planning process, where she evolved to a program manager and became actively involved in program design, and implementation for both residential and nonresidential new construction programs. As SCE's residential new construction portfolio expanded to include a variety of programs and services, Michelle's role again evolved to a project manager level where she is responsible for overseeing and managing the development and implementation of the residential new construction programs by directing the design, evaluation, analysis, and satisfaction of regulatory requirements. During her 13 years within the residential new construction energy efficiency arena, Michelle has worked on a variety of SCE programs such as Welcome Home, ComfortWise, and the statewide California Energy Star Homes Program, as well as managing the SCE's local government initiatives (LGI). Additionally, Michelle's experience within this sector has lead to extensive interface and involvement with the California Building Industry Association, Building Industry Institute, California Energy Commission, Environmental Protection Agency, and the California Homes Energy Efficiency Rating System (CHEERS) – on which she sits as a Board Member.

Lisa Brewer, Program Manager

Lisa Brewer brings 12 years of experience in the residential new construction sector to this program offering, with expertise in the areas of program analysis and management. Lisa began her career with SCE as a program incentive coordinator primarily supporting SCE's residential new construction program. Lisa's role within the residential new construction program grew to an analyst level where she applied her skills to tracking and reporting of results, budgets, and incentives. As SCE's residential new construction portfolio continued to expand, Lisa became (and currently holds the position of) program manager where her primary responsibilities include development and execution of programs and contracts, developing/negotiating proposals, managing compliance requirements, budget tracking, and quality standards. Lisa's 12 year career within the residential new construction energy efficiency programs has had her working on a number of SCE's new construction initiatives such as: Welcome Home, ComfortWise, as well as SCE's local government initiatives, and currently the California Energy Star New Homes Program.

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Elisa Clifford, Account Manager

Elisa Clifford has 20 years experience with Southern California Edison. Elisa started in the Meter Reading Department, moved to Customers Service and for the last 13 years has been in the Energy Efficiency department. Elisa has worked with all levels of customers, from small, non residential to our largest non residential customers. Elisa moved to Residential New Construction group since 2000 and currently is the field representative for the Southern California Edison service territory. Elisa has worked on building strong relationships with the building Jurisdiction and being a “single point of contact” for all Edison products and services. Elisa delivers to the building Jurisdiction the California Energy Star New Homes Program (CESNHP) which encourages builders to build homes 15% better than the minimum energy efficiency standards for California. The CESNHP has both a single family and multifamily component, both which are Elisa’s responsibility. Elisa works directly with the builders to provide the information required to participate and follows the project from start to finish. Elisa provides support to both the Project Manager and Program Manager to ensure that our CESNHP is a success. In addition to the CESNHP, Elisa works on the Local Government Initiative (LGI) program which provides energy efficiency information and services to the local governments within the Edison service territory. The LGI’s program specifically highlights the Jurisdiction Energy Efficiency Program, which encourages cities to recognize builders who build energy efficient homes in their Jurisdictions. Elisa is active in the Building Industry Association providing utility input to the building Jurisdiction.

VIII. Budget

Program Budget	
Total Program Budget	\$1,799,999
Administrative	\$297,600
Marketing	\$90,000
Direct Implementation	\$1,340,400
EM&V	\$71,999
Other	